



Fiscal Note and Budget Item Follow-Up Report

Business, Economic Development, and Labor Subcommittee

ISSUE BRIEF

SUMMARY

This report follows-up on select fiscal notes and budget actions from past legislative sessions. For each item, the report includes a stop light (red, yellow, green) for implementation status, budget accuracy, and, where available, performance. It details original cost and/or revenue estimates, legislative appropriations, and actual experience. It is intended to create a feed-back loop that improves future estimates and initiatives.

The report is organized by Appropriations Subcommittee, year, and type of follow-up item. The report contains items from the 2014 through the 2016 legislative General Sessions, which is indicated in the top left corner of the page. Fiscal notes of bills passed during a legislative session are prefixed with the bill number.

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FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Industrial Assistance Fund Replenishment

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$4,525,000	\$0	\$4,525,000	\$0	\$4,525,000	\$4,525,000	\$0

Explanation

The Industrial Assistance Fund (IAF) provides economic opportunity grants, funding for the Business Expansion and Retention (BEAR) program, rural fast track programs and post performance grants related to job creation. The Legislature appropriated \$4,525,000 one-time to partially replenish the fund due to credits that have been earned by companies.

Implementation

In FY 2016, expenditures and encumbrances were: rural fast track grants \$1,800,000; BEAR grants \$900,000; Economic Opportunity grants \$2,300,000; post performance grants \$7,600,000 and \$1,400,000 to Smart Schools . The FY2016 supplemental appropriation replenished a portion of the fund.

Accuracy

GOED staff review all requests for funding and payments are issued on a post performance basis once contracted requirements are met.

Performance

Program success is measured by job growth. As requests for payment are received, GOED uses information provided DWS and the State Tax Commission to verify job creation and growth claims. Rural Fast Track grants require companies to hire at least one person before a payment is issued. BEAR grants are not tied specifically to hiring. There are many factors (determined at grant issuance) that must be achieved before payment. Each request is verified for compliance with grant terms.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Avenue H

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$750,000	\$0	\$750,000	\$0	\$750,000	\$750,000	\$0

Explanation

The Office of Consumer Health Services operates Avenue H, Utah’s state based approach to health reform. It is designed to help small businesses in the state offer health insurance to their employees through a competitive online marketplace. The marketplace provides a convenient and simple solution for employers to provide a set dollar amount contribution and allow their employees the choice of over 70 different health plans. This program has been funded with one-time money since FY 2008 and was provided with ongoing funds for FY 2016.

The Affordable Care Act requires each state to operate a state based marketplace or defer the operations to the federal government. Utah chose a bifurcated approach where Utah continues operation of the small business marketplace, while the federal government operates the Individual Marketplace.

Implementation

The funding is used to operate the health insurance marketplace falling into one of three categories: 1) personnel who manage and oversee the technology vendor’s activities, broker support and enrollment process, 2) technology is provided through two contracted third party technology vendors which have development and ongoing fees for our solution, 3) marketing the solution to brokers and the small business community.

Avenue H had access to federal grant funds that were available during FY 2015 resulting in nonlapsing balance of \$400,000 to FY 2016. The legislature transferred these additional funds from OCHS for construction of the St. George Welcome Center.

Accuracy

During FY 2016 the major expenditures of Avenue H were for personnel which facilitate the marketplace. In order to educate the market on the program and increase participation, Avenue H launched on a testimonial marketing campaign that spanned FY 2015, funded by federal grants, and FY 2016. The campaign included TV, radio, digital and direct mail. In addition, Avenue H updated technology to accommodate the market increase from 1-50 to 1-100 as part of the ACA. Unfortunately, after technology was updated, Congress changed the law and allowed the state’s the discretion to expand to the larger market. Utah chose not to, therefore we had to roll back our technology changes.

Performance

Avenue H increased the number of participating small businesses by 132, bringing the total to 801 businesses as of June 1, 2016. The number of covered employees grew from 5,410 to 5,851. Past growth has been approximately 18% annually, however the growth trend has slowed recently as a result of the Insurance Department’s liquidation of one of the participating carriers, Arches Health Plan in January 2016, and the smaller market size.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Tourism Marketing Performance Fund

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$18,000,000	\$0	\$18,000,000	\$0	\$18,000,000	\$15,000,000	\$3,000,000

Explanation

The Tourism Marketing Performance Fund is a performance based funding mechanism linked to increases in sales tax revenue for a variety of tourism related industries. Funding is used to fund the tourism advertising program. The overall goal of the Marketing Program is to increase the national and international awareness, inquiries, and tourism visits to Utah.

Implementation

The fund is statutorily allocated as follows: 20 percent to a co-op program in which there is a 1:1 match with local entities for out-of-state marketing; 10 percent to the Sports Commission for sports promotion; and 70 percent for direct out-of-state marketing. Funding is committed by contract in July and released as the statutory criteria are met throughout the fiscal year.

Accuracy

The fund has an estimated (at 6/30/2016) non lapsing balance of \$3 million which is made up of committed projects that overlap fiscal years. Funds are divided between the winter and spring campaigns. The previous campaign was the Mighty Five which showcased the national parks throughout the state. The current campaign is "The Road to Mighty" which is showcasing the state parks. Funds are expended for these campaigns once the contractual obligations are met.

Performance

According to GOED the state benefited from the expenditures of the fund as follows: A dollar spent on winter promotions generated \$3.26 in state taxes and \$2.26 in local tax revenue. A dollar spent on the combined spring, summer and fall promotions generated \$6.82 in state taxes and \$4.72 in local tax revenue.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Compliance Staff for Incentives

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$110,000	\$0	\$110,000	\$0	\$110,000	\$110,000	\$0

Explanation

The Legislature appropriated \$110,000 to increase compliance staff in GOED. Funds were appropriated to strengthen the compliance division in response to SB 179; Amendments to Economic Development

Implementation

Funds were expended in FY 2016 on 2 FTE. A Compliance Auditor and an Internal Auditor.

Accuracy

Funds were used as intended by the legislature. Additional FTE were hired resulting in increased reporting and tracking of programs

Performance

Funds were used to complete an internal risk assessment and one internal audit by the new Internal Auditor. Policies and procedures are being established for compliance with additional reporting and tracking of programmatic results.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Broadband Program Staff

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$425,000	\$0	\$425,000	\$0	\$425,000	\$385,000	\$40,000

Explanation

Funds were appropriated in H.B. 414, Utah Broadband Outreach Center Act, passed in 2015. The Outreach Center was created by the legislature to coordinate broadband development policy and promotion among broadband providers, state and federal agencies, and local government entities. The center was also tasked with collecting and maintaining a database and interactive map that displays residential and commercial broadband data.

Implementation

One time funds of \$75,000 were expended in 2015 to staff the Utah Broadband Outreach Center with two full time employees between April 1-June 30, 2015. These employees worked with providers, along with federal, state and local governments to study and implement best practices and provide policy guidance. This sum also included \$25,000 contract with the Utah Automated Geographic Reference Center (AGRC) to maintain an online map of broadband services throughout Utah. AGRC was identified in statute as the entity providing these services.

One time funds of \$350,000 were expended in 2016 to staff the Utah Broadband Outreach Center with two full time employees between July 1, 2015-June 30, 2016. These employees worked with providers, along with federal, state and local governments to study and implement best practices and provide policy guidance. This sum also included \$125,000 contract with the Utah Automated Geographic Reference Center (AGRC) to maintain an online map of broadband services throughout Utah. AGRC was identified in statute as the entity providing these services.

Accuracy

Funds were used as intended by the legislature and paid for both the program activities identified in the bill and for the mapping contract.

Funds were used to fill the statute by:

- Coordinating broadband development policy and promotion among voluntarily participating broadband providers in the state, state and federal agencies, and local government entities in the state.
- Making recommendations to the governor and legislature regarding policies and initiatives that promote the development of broadband-related infrastructure and helped implement those policies and initiatives.
- Promoting policies and initiatives that encourage private-sector deployment of infrastructure and public-private partnerships to increase broadband services to urban and rural communities.
- Facilitating coordination between broadband providers and public and private entities.
- Promoting the adoption and utilization of up-to-date broadband technologies and infrastructure.
- Collecting and analyzing data on broadband availability and usage in the state, including Internet speed, capacity, unique visitors, and broadband infrastructure available throughout the state.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Sports Commission

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$500,000	\$0	\$500,000	\$0	\$500,000	\$500,000	\$0

Explanation

The Legislature appropriated \$500,000 to increase the budget of the Sports Commission. The Utah Sports Commission helps to enhance Utah's economy, image and quality of life through the attraction, promotion and development of national and international sports and is a catalyst for Utah in its Olympic legacy efforts.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. The Sports Commission receives 10% of the Tourism Marketing Performance Fund (this year this amount is \$1,800,000). Additionally it receives \$3,200,000 of ongoing funds annually. For FY 2016, it was also provided with an additional \$500,000 in one time funding. When combined the Utah Sports Commission received \$5,550,000 in FY 2016.

Accuracy

The Pass Thru Agency requested and received 100% of the appropriated funds. The agency submits an annual report of its activities during the year and reports it has an annual financial audit.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. DABC Warehouse Management Information System

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$2,000,000	\$0	\$2,000,000	\$0	\$2,000,000	\$2,051,700	(\$51,700)

Explanation

In the 2015 General Session the Legislature provided the Department of Alcoholic Beverage Control \$2,000,000 in nonlapsing authority to update the Department's warehouse information system. The previous warehouse information system was operating on software that was no longer supported and hardware that was outdated. Once the system is updated the Department estimates approximately \$200,000 in ongoing savings from software support. The Legislature has already accounted for the savings in the FY 2017 budget.

Implementation

The conversion was started on July 22, 2014 and is expected to be completed by July 31, 2016. Funding was used for the following:

- Implementation Services
- MS Dynamics AX (Licensing and Software Assurance)
- Software (Credit Card Processing In AX POS)
- Hardware
- Software (Licenses)
- DTS Server Costs

Accuracy

To date the Department has spent \$1,974,003 on the Warehouse Information System in the following categories:

- Implementation Services \$1,375,973
- MS Dynamics AX (Licensing and Software Assurance) \$314,021
- Software (Credit Card Processing In AX POS) \$124,500
- Hardware \$117,400
- Software (Licenses) \$22,109
- DTS Server Costs \$20,000

Another \$77,664 is committed to complete the project. Total costs for the project when completed will be \$2,051,667.

Performance

No performance measures have been created or tracked. The Department expects to see savings of \$200,000 in software maintenance costs annually but will not have the actual data until the end of FY 2017.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Credit Card Processing Fees

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$724,000	\$0	\$724,000	\$0	\$724,000	\$724,000	\$0

Explanation

Since fiscal year 2013 DABC has seen credit card fees continue to increase as retail and licensee sales keep on growing. The Legislature appropriated \$724,000 do cover the demand for credit card payments and reduce potential risk from cash only transactions.

Implementation

The Department has expanded its credit card program beyond retail sales to include licensees, giving them the ability to pay for their purchases with credit cards. Allowing another means of payments besides cash, checks, or ACH creates convenience for the licensees; that also reduces payment processing time and risk related to cash receipt.

Accuracy

The credit card fees charged by the merchants in fiscal year 2016 have increased approximately \$724,000 from fiscal year 2015 as DABC retail sales and credit card sales continue to grow.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Captive Insurance Staff

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$225,000	\$0	\$225,000	\$0	\$225,000	\$150,000	\$75,000

Explanation

The Captive Insurance Program is focused on implementing the Utah Captive Insurance Companies Act, as well as promoting Utah as a domicile for captive insurance companies operating nationally and internationally. Because Utah has become known as a premier state for captive insurance companies to become domiciled, growth has been rapid in recent years. Due to this growth, the Legislature approved a cap increase for the Captive Insurance Restricted Account and an increase in funding beginning in FY 2016.

Implementation

The program was implemented within the effective date identified in the bill. The department was able to utilize the funding to provide more training for auditors who reached various certification levels necessary for accreditation. Additionally, the Captive Division improved the SUCCESS measures including: increased reviews of annual statements, ad hoc projects due to changes with the Internal Revenue Service and captive company reporting. Additionally, the funding has been used to absorb the caseload growth in reviews and audit requirements.

Accuracy

In FY 2016 the division maintained similar staff levels but absorbed the higher workload. Initial funding was utilized mainly for training and ad hoc projects. The balance of \$75,000 exceeded the 10 percent margin allowed as a result the accuracy of the funding estimate has been classified as red. In FY 2017 the Division expects to hire a new auditor with the remaining funds to keep up with growth in the captive insurance industry.

Performance

Over the past three years, the Captive Division has absorbed workload and improved efficiencies through SUCCESS measures. The division has continued to process reviews with the same staffing levels, thus increasing their productivity.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Museum Grants

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$100,000	\$0	\$100,000	\$0	\$100,000	\$100,000	\$0

Explanation

In the 2015 General Session the Legislature appropriated \$100,000 one-time to expand the museum grant process. The funding was used to help Utah museums increase the quality of their collections and the professionalism of the museums in administration, collection, exhibits and educational programming.

Implementation

Funding was provided through a competitive grant process which started July 1, 2015. To be eligible museums had to show that they could increase the quality and professionalism of the museum through a variety of procedures.

Museum improvement is determined by a standard metric called the "Utah State Performance Goals." This metric was developed by the Office of Museum Services using national guidelines from the American Association for State and Local History STEPS program and the American Alliance of Museums' MAP program, both nationally recognized museum programs that measure museum best practices and improvement.

Eight areas of operations are measured as they pertain to museums: structure, staff/volunteers, finance, facilities, collections management, exhibitions, education, and public relations. Grantees fill out the sections relevant to their grant request on a self-rated scale of "good" "better" or "best." Towards the end of FY16, the Museum Specialist conducted site visits to a selected group of grantees to determine how grant funding has assisted in improving museum operations. Improvement is noted in Section 6B of the Utah State Performance Goals worksheet.

Improvement is generally noted as a shift from "good" to "better" or from "better" to best" as determined by what the Museum Specialist sees on her site visit with the grantee. She meets with the grantee and reviews the sections that are applicable to the grant and requests to see where and how improvements were made during the site visit. All improvements are noted and recorded as per the Heritage and Arts SUCCESS guidelines.

Accuracy

Funding was distributed as follows:

- American Fork DUP Museum \$1,000 to build a pavilion to protect a buggy and a wagon
- Box Elder Museum of Natural History \$6,000 for exhibition interpretation and cataloging
- Brigham City DUP Cabin \$1,000 for artifact inventory software
- Bryner Pioneer Museum \$1,000 for Bryner Museum development
- Camp Floyd State Park \$1,000 for reconstruction of the Camp Floyd 1858 flag and flagpole
- Discovery Gateway Children's Museum \$10,500 for studio upgrades with a STEM (Science, Technology, Engineering, Math) emphasis
- Fort Douglas Military Museum \$10,500 for the Territorial Militia (Nauvoo Legion) Exhibit
- Frontier Homestead State Park Museum \$12,000 for the Hunter House Summer Kitchen
- John Wesley Powell River History Museum \$3,000 for the This is Green River: materials funding for rotating community exhibitions
- Kamas/Rhoades Valley DUP Museum \$600 for the Kamas/Rhoades Valley DUP Museum
- Loveland Living Planet Aquarium \$1,000 for the Leopard Seal & Mola Mola
- McQuarrie Memorial Pioneer DUP Museum \$1,000 upgrade and replace lighting fixtures throughout Museum

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Museum Grants

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$100,000	\$0	\$100,000	\$0	\$100,000	\$100,000	\$0

Miss Mary Salina Historical Museum \$1,000 for a Miss Mary's Historical Museum Preservation/Enhancement Grant
 Mount Nebo Camp DUP \$500 for the McConkie Pioneer Cabin
 St. George Art Museum \$12,000 for spacesaver art hanging racks
 Tooele Pioneer DUP Museum \$1,000 for plaques
 Topaz Museum \$1,000 for preserving and caring for documents and photographs
 Tracy Aviary \$12,000 for the Tracy Aviary Nature in the City Program
 Treehouse Children's Museum \$15,000 for the Science Circus at Treehouse
 Utah Wing of the Commemorative Air Force \$1,000 for the Restoration of Stearman Aircraft N1387V: A Piece of Living History
 Western Mining & Railroad Museum/Helper Museum \$7,500 to move the railroad exhibits and create records of Railroad Artifacts.

Total \$100,000

Museums are under contract to measure the results of the funding allocation.

Performance

Museums are under contract to measure the results of the funding allocation. Heritage and Arts staff review results by auditing 20 percent of the grantees and completing site visits. Of the audited museums, 24 percent saw and improvement in quality and professionalism as defined in the contracts.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Community Library Enhancement Funding

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$100,000	\$0	\$100,000	\$0	\$100,000	\$100,000	\$0

Explanation

The Legislature appropriated \$100,000 to help enhance public library services throughout the state.

Implementation

The Utah State Library Division implemented the Focused Library Improvement Plan to target selected benchmarks to improve services in select Utah Libraries. Five awards were provided to public libraries, which include: Duchesne County Library, Eagle Mountain City Library, Panguitch Public Library, Saratoga Springs Public Library, and Spanish Fork Public Library.

Accuracy

Funds were used as intended, to enhance public library services throughout the state.

Performance

Interim reports show that the overall impact of the Focused Library Improvement Plan projects has been positive, the participating libraries have made significant improvements to their library operations, and the public has seen better service that enhances their quality of life. Assessment of the impact on the targeted benchmarks will be completed in the spring of 2017 when the FY2016 statistics of public library services in Utah become available.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Moab Music Festival

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$25,000	\$0	\$25,000	\$0	\$25,000	\$25,000	\$0

Explanation

The Legislature appropriated \$25,000 to help fund the Moab Music Festival. Funds will be used to support marketing, artist and production expenses for the Moab Music Festival's 12-day event. Funds will also help fund annual Grand County school music assemblies, and Artist-in-Residence community programs. The Festival attracts over 3,000 ticket buyers from around the nation and world, and provides cultural enrichment and economic stimulus to the Moab community.

Implementation

Funds were used for festival operation expenses, artist fees, marketing invoices, and education outreach programs.

Accuracy

Funds were used as intended, for festival operation expenses, artist in residence fees, marketing and education outreach programs.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Eden Package Agency

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$65,000	\$0	\$65,000	\$0	\$65,000	\$13,500	\$51,500

Explanation

The Legislature appropriated \$65,000 for the establishment of a package agency in Eden, Utah. Funding was originally intended for a type III package agency which operates as a stand alone entity.

Implementation

The Department of Alcoholic Beverage Control went through a selection process which resulted in the issuance of a Type II package agency contract. A type II package agency operates in conjunction with another business and the primary source of income is not liquor sales. The package agency license was approved August 25, 2015.

Accuracy

The original estimate was \$65,000 for a Type III package agency. Because the Department selected a Type II package agency through the competitive process the costs were only \$13,500 annually, \$51,500 lower than the original estimate.

Performance

There is insufficient performance data at the time of the report since the package agent was issued a type II package agency license less than a year ago.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Electronic Payment Fees

Committee: BEDL

Analyst: Clare Lence

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$900,000	\$0	\$600,000	\$300,000	\$900,000	\$840,300	\$59,700

Explanation

The Motor Vehicle Division of the Tax Commission facilitates electronic payment options for individuals engaging in motor vehicle transactions. In addition to the payment amount, individuals pay an electronic transaction fee. These fees are deposited into the Electronic Payment Fee Restricted Account (EPFRA) until the Tax Commission remits them to the appropriate third party, such as a bank or credit card company. Because the EPFRA is a restricted account, the Legislature appropriates spending authority to the Tax Commission. Consistent growth in electronic payment volume in recent years has led to consistent requests for increases to spending authority by the Tax Commission. During the 2015 General Session, the Legislature appropriated \$300,000 as a supplemental for FY 2015 and \$600,000 ongoing for FY 2016; during the 2016 General Session, the Legislature appropriated \$300,000 as a supplemental for FY 2016 and \$750,000 ongoing for FY 2017. The total appropriation for FY 2017 is \$7,109,700. The amounts shown above are for FY 2016 only.

Implementation

The Tax Commission reported that payments were made from the EPFRA appropriation to third parties as requests were received.

Accuracy

The commission estimated actual expenditures -- payments remitted -- at \$59,700 less than the appropriated amount, or 6.6 percent of the additional FY 2016 appropriations. Compared to the total FY 2016 appropriation of \$6,659,700, the difference was about 1 percent.

Performance

The Tax Commission does not control the amount of fees owed to third parties but does estimate the future growth in order to make an accurate appropriations request. The difference between appropriations and expenditures was \$0 in FY 2013, \$712,256 in FY 2014, \$0 in FY 2015, and \$59,700 in FY 2016, suggesting relatively accurate projections.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Office Space Lease Increase

Committee: BEDL

Analyst: Clare Lence

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$26,000	\$0	\$26,000	\$0	\$26,000	\$15,985	\$10,015

Explanation

The Legislature appropriated \$26,000 ongoing to the Department of Financial Institutions from the Department of Financial Institutions Restricted Account for increased costs related to a new lease on the department's existing office space. The lease is renegotiated every five years by the Department of Facilities and Construction Management (DFCM); the new lease is in effect through June 2020. The new terms included an increase in per-square-foot and parking costs. The department also included in the request the expected increases in property taxes and common area maintenance costs that would be in effect by the final year of the lease term.

Implementation

On July 7, 2015, the department made the lease payment for FY 2016 in accordance with the new terms. The payment included a \$2,519 increase in per-square-foot costs. The higher parking costs were paid monthly, for a total increase of \$4,200 over the course of the year. On November 9, 2015, the department paid its proportional share of 2015 property taxes, which included a \$1,115 increase. On May 19, 2016, the department paid its proportional share of 2015 common area maintenance costs, which included a \$8,151 increase.

Accuracy

Of the \$26,000 appropriated, the department expended \$15,985 in FY 2016. Remaining funds lapsed to the Department of Financial Institutions Restricted Account. The department assumed that property tax and common area maintenance costs would increase continually over the five-year lease term, resulting in an additional increase of \$5,800 in property taxes and \$7,400 in common area maintenance costs by FY 2020. The department's projections would place total costs at about \$29,000 by FY 2020, slightly over the new appropriation.

Performance

The department did not provide any performance measures.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Package Agency Contractual Compensation

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$35,000	\$0	\$35,000	\$0	\$35,000	\$35,000	\$0

Explanation

The Legislature appropriated \$35,000 to allow the Department of Alcoholic Beverage Control to increase compensation to seven high performing package agencies while decreasing compensation to one package agency. Increases or decreases to compensation are based on the volume of sales occurring at the package agencies.

Implementation

The Department of Alcoholic Beverage Control implemented the changes to compensation in early July 2015. The package agencies receiving increases were Mt. Pleasant, Salina, Springdale, Kanab, Tremonton, Delta, and Midvale. The decreased compensation was the packaged agency in Monticello.

Accuracy

The increases/decreases to annual compensation are detailed below:

Mt. Pleasant \$4,331.31
 Salina \$4,331.31
 Springdale \$4,331.31
 Kanab \$8,662.61
 Tremonton \$4,331.31
 Delta \$8,662.61
 Midvale \$4,331.31
 Monticello (\$4,331.31)

Total \$34,650.46

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Parents Empowered Statutory Increase

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$122,400	\$0	\$122,400	\$0	\$122,400	\$122,400	\$0

Explanation

This bill authorized an additional \$122,400 to the DABC Parents Empowered Program to be used for underage drinking prevention media and education campaign.

Implementation

Funding was allocated to existing program tools including: videos, radio and print ads, and other resources.

Accuracy

By the end of fiscal year 2016, the program will be spending most of its appropriated amount in various activities that prevent underage drinking.

Performance

Performance measure for the program track the success of the various campaigns.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Business Resource Centers

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$125,000	\$0	\$125,000	\$272,100	\$397,100	\$397,000	\$100

Explanation

The Legislature appropriated \$125,000 for distribution to Business Resource Centers (BRC) throughout the state. BRC's serve as access points for coordinated business services. Often the BRCs play the introductory role in connecting businesses to a variety of service providers through seminars, training and other events.

Implementation

For FY 2016 the Business Resource Centers received \$125,000 one-time General Fund which was contracted to the various centers throughout the state in early July 2015. Funding was committed to provide one-stop technical assistance and access to business resource services provided by a variety of state, federal and local programs.

Accuracy

Funding supports 15 BRCs throughout the state, ranging from small, part-time, one-person rural centers to large, full service, multi agency urban centers. Funding for the program is awarded to qualifying entities through a request for proposal process that ensures statutory requirements are met. Amounts granted to each BRC are based on service area size, population, services offered, and demonstration of past use of funds. Funding allocated includes \$125,000 one-time plus an additional \$272,100 in nonlapsing balances.

Funding allocations are shown below:

- USU - Box Elder \$30,000
- UVU - Wasatch \$20,000
- UVU - Utah Valley University \$54,400
- USU - Uintah Basin \$10,000
- Cach Valley \$20,000
- SLCC - Miller \$40,000
- DATC - Northfront Business Center \$40,000
- DATC - Northfront Business Center (Morgan) \$20,000
- SUU - \$32,000
- USU - San Juan \$25,000
- USU - Castle Country \$20,000
- USU - Moab \$17,000
- Dixie State \$29,000
- SLCC - Park City \$19,500
- Tooele County \$20,000

Total \$397,000

Performance

The Governor's Office of Economic Development measures the impact of the BRC program primarily in the number of entrepreneurs and small businesses that visit the center for referral to the services of partner agencies. Each center's quarterly report includes data from partner agencies on clients served, follow-up visits, jobs created and retained, and incubator tenants.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Information Technology Savings

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$200,000	\$0	\$200,000	\$0	\$200,000	\$200,000	\$0

Explanation

The back-fill for IT efficiency was used to support maintenance and server costs for two systems (the current system and the new Microsoft Dynamics System) while DABC migrated from the old environment to the new one.

Implementation

The migration from the old system to the new system has been in process since fiscal year 2015.

Accuracy

The entire amount is used to pay for the support maintenance and server costs.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Hill Air Show

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$200,000	\$0	\$200,000	\$0	\$200,000	\$200,000	\$0

Explanation

The Legislature appropriated \$200,000 one-time for the Hill Air Force Base Airshow to help with the costs associated with putting on the air show. Funds are used to pay for the fliers, fuel, stands, transportation, displays and amenities. No public admissions can be charged due to federal regulations.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The Pass Thru Agency requested and received 100% of the appropriated funds.

Performance

The Pass Thru Agency reported that it estimated the impact from this bi-annual event will be over \$30 million with over 300,000 in attendance.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Business Marketing

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$200,000	\$0	\$200,000	\$100,000	\$300,000	\$280,000	\$20,000

Explanation

The Governor's Office of Economic Development was appropriated \$200,000 one-time General Fund for Business Marketing plus they had a remaining \$100,000 in nonlapsing balances from a previous allocation.

The Marketing Communications team serves as an in-house "job shop" supporting other GOED departments in developing and executing their public awareness and promotional needs. Major focus areas include: Clusters, Corporate Recruitment, Rural, PTAC, Outdoor Recreation, International Trade, Technology Commercialization, General Marketing, Global Branding and collaborative efforts with partners such as USTAR, Office of Energy Development and World Trade Center Utah.

Implementation

GOED developed a plan for funding and had contracts in place by the end of July 2015. The goal of GOED for the funding was to highlight Utah as a prime location for company relocation and expansion, particularly in high-growth industry clusters, and build awareness of GOED services for in-state businesses. Tactical promotional tools that received funding included print and online advertising, social media, events, sponsorships and related public relations.

Accuracy

GOED expects to expend \$280,000 in FY 2016, \$200,000 from the FY 2016 allocation and \$80,000 in nonlapsing balances. Expenditures to date are \$256,007 and have been spent as follows:

- Advertising \$115,653 or 46 percent of the total
- Brochures/Printing \$15,363 or 6 percent of the total
- Events \$52,706 or 21 percent of the total
- Misc/Travel \$3,494 or 1 percent of the total
- Research \$8,691 or 3 percent of the total
- Sponsorships \$34,900 or 14 percent of the total
- Web and Social Media \$25,200 or 9 percent of the total

Performance

GOED tracks monthly activity on their website, growth in social media followers, open rate of email communications, number of persons reached by events and trade shows, and leads generated for EDCU through print and online ads. Details are in the GOED annual report. In FY2016 GOED conducted for the first time a survey of Utah-based small businesses to gauge their awareness of GOED services. This will serve as a baseline for future years.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Rural Outreach Coordinator Position

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$80,000	\$0	\$80,000	\$0	\$80,000	\$80,000	\$0

Explanation

The Legislature provided \$80,000 to GOED to hire a rural outreach coordinator.

Implementation

The funding for the Rural Outreach Coordinator position has been used over the past 2 ½ years to provide a GOED representative in rural parts of the state. The Outreach Coordinator covers 25 rural counties in Utah and travels to each county as often as possible to meet with local elected officials, business owners, County/city economic development directors and staff. The Outreach Coordinator, amongst other things, provides education and training on GOED programs, offers community driven strategic planning support, performs site visits required for Rural Fast Track Grants and Recycling Zone grants and incentives and meets face-to-face with local elected officials to act as a liaison between local governments and GOED.

Accuracy

Funds were fully utilized to hire a rural outreach coordinator.

Programs currently taking place which did not happen before outreach coordinator

- a) Community Driven Economic Development Planning
- b) GOED Coordination between the state and rural county governments
- c) Rural economic development director/staff training
- d) Full participation by all 25 rural counties in Business Expansion and Retention (BEAR) program (FY2017)
- e) Increased awareness of all State business development resources
- f) Town Hall meetings and trainings for local business owners about GOED programs including; Rural Fast Track Grants, Enterprise Zones, BEAR, Recycling Market Development Zones, etc.

Performance

The Rural Outreach Coordinator has given the Governor’s Office of Economic Development a connection point to the 25 diverse rural counties in the State of Utah, many of which are not experiencing the same economic prosperity as urban counties along the wasatch front. The coordinator provides in person training, education and implementation support to local elected officials, economic development directors and rural small businesses. Without the presence of the Rural Outreach Coordinator, 25 rural counties would have little face-to-face interaction with GOED and many, if not all, GOED rural programs would be underutilized and ineffective.

One example of the increased usage of GOED programs since the inception of the Outreach Coordinator position is the dramatic increase in Rural Fast Track grants awarded.

FY 2011: 15 RFT grants awarded
 FY 2012: 15 RFT grants awarded
 FY 2013: 11 RFT grants awarded

Outreach Coordinator Position began Sept. 2013 (FY2014)

FY 2014: 21 RFT grants awarded

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Rural Outreach Coordinator Position

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$80,000	\$0	\$80,000	\$0	\$80,000	\$80,000	\$0

FY2015: 28 RFT grants awarded
FY 2016: 31 RFT grants awarded

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Title Insurance Restricted Fund Increase

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$9,800	\$9,800	\$9,800	\$0	\$9,800	\$9,800	\$0

Explanation

The Title Licensee Enforcement Restricted Account was created in the 2010 General Session in order to properly administer and pay for costs associated with regulation of the title insurance industry. Since the creation of the program, the personnel costs which make up the majority of expenditures for the program have risen. It was necessary to increase the restricted fund appropriation to capture these costs, particularly because they are housed in an independent line item.

Implementation

The department was able to fully capture all related costs within the line item.

Accuracy

Costs for the Title program increased by \$8,500 from FY 2014 to FY 2015. The increase in the restricted account captured these costs plus growth anticipated for FY 2016.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Utah Symphony Documentary

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$250,000	\$0	\$250,000	\$0	\$250,000	\$250,000	\$0

Explanation

The Legislature appropriated \$250,000 to support Utah Symphony costs associated with recording and the necessary operating support for the Mighty 5[®] Documentary in the 2015 calendar year. Utah Symphony will be featured on a professionally recorded documentary, produced by KUED, with Maestro Thierry Fischer narrating.

Implementation

Funds were used by the Utah Symphony to create a documentary featuring the National Parks in Utah and celebrating the National Park Service Centennial featuring music from the Utah Symphony.

Accuracy

Funding was used as intended, to create the documentary and record the symphony.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Clark Planetarium Exhibits

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$250,000	\$0	\$250,000	\$0	\$250,000	\$250,000	\$0

Explanation

The Legislature appropriated \$250,000 for the Clark Planetariums Exhibits update. Funds appropriated by the legislature were used to support the planetarium's free public science education exhibits modernization project. The State's contribution was used to help pay for the designing, prototyping, testing, evaluating, fabricating and installation of 8,000 square feet of space science and astronomy education exhibits in Clark Planetarium.

Implementation

Funding was used to design and install 10,000 feet of new science education exhibits. Clark Planetarium has contracted with Roto Group, LLC to do this work. All phases of this exhibits modernization project are on schedule and on budget for completion in October, 2016.

Accuracy

Funds were used as intended, for the exhibits modernization project.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Utah Railroad Museums Grant Writer

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$100,000	\$0	\$100,000	\$0	\$100,000	\$0	\$100,000

Explanation

The Legislature appropriated \$100,000 one-time for the establishment of a grant writer position at the Utah State Railroad Museum Authority. Funding was to be used over multiple years to help the authority apply for federal and private grants.

Implementation

Heritage and Arts was unable to distribute the funding to the entity because the Railroad Museum did not have a bank account. For most of the year the museum did not have an organizational structure which would allow the establishment of a bank account. As a result the Museum could not accept the legislative funding.

Recently, the Utah Railroad became a non-profit, which allowed them to open a bank account. Heritage and Arts has since signed a contract with them and has provided the funds to them. They have a contractual obligation to provide the detail of expenditure upon completion of the process.

Accuracy

Because of the problems with the organizational structure of the entity, funds were not distributed within the timeframes required by the report. As a result the balance expended at the time of the request for information was zero. Since the organization became a non-profit they have received the balance of the funding. However, the detailed expenditure report was not available at time of publication since the organization has not had time to hire the grant writer.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Utah Aviation Hall of Fame

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$150,000	\$0	\$150,000	\$0	\$150,000	\$150,000	\$0

Explanation

The Utah Aviation Hall of Fame will be moved to a prime location close to the main entrance of the Hill Aerospace Museum. The project will include the demolition and remodeling of the current space which will allow the museum to display the commemorative plaques and recognition pieces. Interactive displays will provide narratives, photographs, film and video.

Implementation

Funding was used for the Aviation Hall of Fame. Contracts were entered into with Fusion Imaging (Kaysville, Utah) and Highway 89 Media (Ogden, Utah) to design, manufacture and install elements of the Utah Aviation Hall of Fame including multi-media. Construction was completed prior to Memorial Day, 2016.

Accuracy

Funds were used as intended, for the new Utah Aviation Hall of Fame as specified.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. CenterPoint Legacy Theatre

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$125,000	\$0	\$125,000	\$0	\$125,000	\$125,000	\$0

Explanation

The Legislature appropriated \$125,000 to the Centerpoint Legacy Theatre. Funds were used for capital improvements to performance spaces and to help fund educational outreach programs.

Implementation

Funding was used for Retractable Seats for Black Box Performance Space, as well as a Lighting Batten in the Barlow main stage performance space. Funds were also committed for replacement of lighting fixtures in Barlow main stage auditorium to utilize LED lighting.

Accuracy

Funds were used as intended, for capital improvements for the theater.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Ogden Housing Unit Reduction

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$750,000	\$0	\$750,000	\$0	\$750,000	\$750,000	\$0

Explanation

The Legislature appropriated \$750,000 one-time to help revitalize Ogden City housing.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The pass through agency requested and received 100% of the appropriated funds. The recipient reports it has supplemented financing to allow several projects to revitalize Ogden city housing.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Tuacahn Theatre

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$200,000	\$0	\$200,000	\$0	\$200,000	\$200,000	\$0

Explanation

The Legislature allocated \$200,000 one-time General Fund to help construct a 19,000 square foot Arts Center on the Tuacahn property that will house rehearsal space, a dance studio, classrooms, a gift gallery. The \$200,000 will be added to private and local donations to help fund the total cost of the project which is \$3.8 million. Construction started November 1, 2015 and the estimated completion date for the project is August 31, 2016.

Implementation

Quarterly funding distributions were available as of July 1, 2015. However construction of the project did not begin until November 1, 2015. Once distributed, funding was used for preconstruction costs, demolition of the Gift Gallery, excavation work and preparation of the ground floor, lighting, sound and seating.

Accuracy

The state contract required funds to be used for preconstruction costs, demolition of the Gift Gallery, excavation work, preparation of the ground floor, new lighting, sound and seating. The division certified that the full \$200,000 appropriation allocated by the Legislature was spent according to contract based on the reporting required of the Tuacahn staff.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Utah Ethnic and Mining Museum

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$20,000	\$0	\$20,000	\$0	\$20,000	\$20,000	\$0

Explanation

The Legislature appropriated \$20,000 for upgrades and operational support for the Utah Ethnic and Mining Museum. Legislative funds will be used to support operating expenses. Funds will be used in the fabrication and installation of duct work to properly distribute heat throughout the facility.

Implementation

Funding was used to replace the front doors, restore plumbing and upgrade electrical infrastructure.

Accuracy

The funds were used as intended by the Legislature.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Miners Memorial Monuments

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$100,000	\$0	\$100,000	\$0	\$100,000	\$100,000	\$0

Explanation

The Legislature appropriated \$100,000 to help create Miners Memorial Monuments. The Southeast Utah Community Development Corporation will actively work with the Miners Memorial project individuals to procure, design, construct, and install a Miner's Memorial in Price, Utah. The Memorial will be located in Price City Peace Garden Park located at 100 East Main Street in Price, Utah. The project is expected to be fully constructed and dedicated by September 30, 2015.

Implementation

Funding was used for installation of lighting around memorial, purchase/installation of granite stones, purchase/installation of bronze plaques, and installation of rails/fencing around monument. Four satellite monuments will be put up in East Carbon, Helper, Schofield, and Huntington.

Accuracy

Funds were used as intended, for Miner's Memorial Monuments.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. American Freedom Festival of Provo

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$25,000	\$0	\$25,000	\$0	\$25,000	\$25,000	\$0

Explanation

The Legislature appropriated \$25,000 to help support the American Freedom Festival of Provo. Grant money will be used to distribute "Hope of America" packets to school administrators across Utah. The packets include information on the "Hope of America" program mission, music CD's and DVD's that show past performances and teach the individual student actions. Fourteen songs teach students about the Constitution, the Founding Fathers, how government works, an appreciation for the military and other American heroes as well as promoting a greater love of country.

Implementation

A portion of the funds were used for DVD duplication to create Hope of America packets to support the program statewide. Additionally, funds were used for supplies for the event and music royalties used in the program.

Accuracy

Funds were partially used as intended. The entity was contracted to use funds for educational packets but expended the use of funds to pay for the expenditures listed in implementation.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Cluff House

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$40,000	\$0	\$40,000	\$0	\$40,000	\$40,000	\$0

Explanation

The Legislature appropriated \$40,000 to help in the renovation of the Cluff House. The Cluff House, Inc. is a non-profit organization working on the restoration of a small chapel located on Chalk Creek Road, Coalville Utah. The project will begin by reinforcing the foundation to secure the building.

Implementation

Funding was used for footing and foundation repair, electrical and ductwork, insulation and new floors.

Accuracy

Funds were used as intended, to reinforce the foundation of the chapel.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Olympic Legacy Foundation

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$500,000	\$0	\$500,000	\$0	\$500,000	\$500,000	\$0

Explanation

The Legislature appropriated \$500,000 for upgrades to the Olympic Freestyle Pool. Funds will target repairs and improvements to the existing Pool Basin and operating systems, basin expansion, and new ramp renovation. The pool renovation will include a new bubble system and pool basin repair and expansion.

Implementation

State funding was used for the expansion and renovation of the Utah Olympic Park "Spence Eccles Olympic Freestyle Pool." Jacobsen Construction was the general contractor as well as a variety of vendors responsible for artificial snow surface, bubble aeration systems, and plexiglass.

Accuracy

Funds were used as intended, for expansion and renovation of the "Spence Eccles Olympic Freestyle Pool".

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. American Festival Chorus

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$25,000	\$0	\$25,000	\$0	\$25,000	\$25,000	\$0

Explanation

The Legislature appropriated \$75,000 to the American Festival Chorus to support the 2015 season concerts. Funding was used for 11 performances of 8 different concert programs, several which were free and open to the public. Funding was also used to help defray the costs of a temporary change to a smaller venue as well as funding a top-name guest artist.

Implementation

The funding was used for performances and concerts. Funding was also used for guest artists : Jenny Oakes-Baker, Jenny Frogley, and Kurt Bestor. Performances were also recorded and edited with collaboration from Utah Public Radio.

Accuracy

Funds were used as intended, for performances, guest artists, and costs associated with the recording and editing of the concerts.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Heritage and Arts Storage

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$200,000	\$0	\$200,000	\$0	\$200,000	\$200,000	\$0

Explanation

The Legislature appropriated \$200,000 for a new storage system to better protect and provide additional capacity for the State's art collection.

Implementation

Funds were used to procure and install a new storage system early in the fiscal year.

Accuracy

Funds were used as intended, to purchase a new State art storage system. The new storage replacement system increased capacity from approximately 10,560 sq. feet to 18,000 sq. feet. Quality also increased due to protectively hanging the art rather than sliding picture frames in and out of wooden shelving.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Boys and Girls State Camp

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$50,000	\$0	\$50,000	\$0	\$50,000	\$50,000	\$0

Explanation

The Legislature appropriated \$50,000 to help fund the costs of the Boys State/Girls State program at Weber State University.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The Pass Thru Agency requested and received 100% of the appropriated funds.

Performance

The Pass Thru Agency reported that the program expects 225 boys and 337 girls to this summer's program. The funding also has been used to upgrade their website and application process.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Utah Summer Games

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$25,000	\$0	\$25,000	\$0	\$25,000	\$25,000	\$0

Explanation

The Legislature appropriated \$25,000 one-time to the Utah Summer Games to provide sponsorship and financial support for the various Utah Summer Game venues.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The Pass Thru Agency requested and received 100% of the appropriated funds. The recipient reported participation results from 2015 because the 2016 games have not been completed. Over 9,600 athletes participated in individual and team events.

Performance

No performance measures have been created or tracked.

2015 G.S. Advanced Materials Manufacturing Initiative

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$750,000	\$0	\$750,000	\$0	\$750,000	\$750,000	\$0

Explanation

The Advanced Materials Manufacturing Initiative was developed to grow and integrate research, business and educational aspects of composite materials in Utah.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The Pass Thru Agency requested and received 100% of the appropriated funds.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Big Outdoors Expo

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$150,000	\$0	\$150,000	\$0	\$150,000	\$150,000	\$0

Explanation

The Legislature appropriated \$150,000 one-time to provide the third year of operational support for the Big Outdoor Expo, an outdoor show at the Utah Valley Convention Center. In addition to exhibits, the expo includes presentations and classes.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The pass through agency requested and received 100% of the appropriated funds. As a for profit entity the Big Outdoors Expo is not required to provide data that is required of not for profit recipients.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. World Parliament of Religions Conference

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$225,000	\$0	\$225,000	\$0	\$225,000	\$225,000	\$0

Explanation

The Legislature appropriated \$225,000 to help host the World Parliament of Religions Conference in 2015.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The Pass Thru Agency requested and received 100% of the appropriated funds. The appropriation was directed toward local support, coordination, and events in the following categories: Salt Lake City local support; Fine Arts support; Support for Parliament core constituencies; Parliament participant care support; and general Parliament administrative expenses.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Your Utah, Your Future (Envision Utah)

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$500,000	\$0	\$500,000	\$0	\$500,000	\$500,000	\$0

Explanation

The Legislature appropriated \$500,000 one-time for the Envision Utah, Your Utah, Your Future Initiative, an attempt to address the long term growth needs of the state. The goals of the initiative are to ensure that Utahn's have access to clean air, water, educational opportunities and infrastructure.

Implementation

Following the GOED Grants process, pass through agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriations. Upon completion of the event, the pass through entity submits a final report and invoice for the remaining 25%. The second invoice has been submitted and is pending payment.

Accuracy

Funding was allocated and used for the following:

- 1) Online survey instruments \$241,875
- 2) Media and outreach campaign \$60,976
- 3) Statistical Survey \$41,191
- 4) Analyzing the public's choices \$4,529
- 5) Vision documentation \$105,194
- 6) Public vision release \$32,647
- 7) Initial implementation of the vision \$13,588

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Taste Utah Advertising and Marketing

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$150,000	\$0	\$150,000	\$0	\$150,000	\$150,000	\$0

Explanation

The Legislature appropriated \$150,000 to the Taste Utah Program for advertising.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The Pass Thru Agency requested and received 100% of the appropriated funds. The recipient reported the funds were used to create commercials to encourage Utah residents to eat out more often. Funding was also used to purchase air time for the commercials.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Mountain Accord

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$3,000,000	\$0	\$3,000,000	\$0	\$3,000,000	\$3,000,000	\$0

Explanation

The Mountain Accord Program is a public process that seeks to make integrated and critical decisions regarding the future of the Central Wasatch Mountains of Utah. The Legislature appropriated \$3,000,000 to aid in these efforts.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

All funds were paid to UTA. The agency reported that the funds are being held in escrow by UTA.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Utah Council for Citizen Diplomacy

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$15,000	\$0	\$15,000	\$0	\$15,000	\$15,000	\$0

Explanation

The Legislature appropriated \$15,000 to increase funding to the Utah Council for Citizen Diplomacy.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The Pass Thru Agency requested and received 100% of the appropriated funds.

The funds were be used as identified below:

- To promote Utah globally through a nonpartisan, private-sector partnership with the U.S. Department of State's International Visitor Leadership Program
- To bring over 350 high level officials from over 90 different countries to Utah for short-term professional and cultural programs
- To facilitate international collaboration between representatives from Utah's private and public sectors
- To promote Utah globally via U.S. Embassies and the U.S. Department of State

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Technology Commercialization Innovation Program

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$1,000,000	\$0	\$1,000,000	\$0	\$1,000,000	\$1,000,000	\$0

Explanation

The Legislature appropriated These funds are awarded on a competitive basis to small businesses and university startups that are commercializing technology that will result in economic development and job creation in the state.

Implementation

The additional \$1 million of one-time funding that was allocated to the Technology Commercialization and Innovation Program for 2016 added to the existing on-going appropriation. The one-time significantly increased the funding that was awarded on a competitive basis to small businesses and university startups that are commercializing technology that will result in economic development and job creation in the state.

Accuracy

Funding was fully distributed based on the existing prioritization process. The additional funds greatly impacted the program in fiscal year 2016. The 2016 TCIP grant solicitation was the most competitive in the history of the program with over 200 applications and over a 120% increase in applications from 2015. The increased funding contributed to the increased competitiveness, which GOED felt increased the quality of awardees. The additional funds have allowed the program to increase the number of grant awardees by 31% from 2015, and with that greater number of awards the diversity of the grant awardees has also increased. The additional funding also allowed the program to increase the average level of funding per award by approximately 44%, giving awardees a greater opportunity to commercialize their technologies more quickly by reducing the amount of time spent by the company fundraising.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Film Commission Strategic Plan

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$200,000	\$0	\$200,000	\$0	\$200,000	\$200,000	\$0

Explanation

The Utah Film Commission recognized a growing need to assess its role in the growing cluster of digital entertainment and determine how it best fits in with Utah’s long history with film. Through a variety of strategies, they will determine how to be a forward thinking, strategic participant in the new world of film and digital entertainment. To assess these needs the Legislature appropriated \$200,000 for a strategic plan.

Implementation

Funding was used to commission a data study to assess film and digital media industries that includes historical context, identification of economic sectors, competitive advantages and opportunities for improvement. Funding was also used for research and travel to other states that are fostering creative industries including New York City, Los Angeles, and Austin. The film commission also convened industry stakeholders to help foster workforce development.

Accuracy

- Kem C. Gardner Policy Institute Study – An assessment of the film and digital media industry in Utah (\$50,000)
- Sponsorship with Utah Center for Digital Arts on a Digital Media Summit (\$50,000)
- UFC analyst/additional Part time staff to assist with programs (\$30,000)
- R&D of successful models in other states, travel (\$25,000)
- UFC Industry day and training- (\$25,000)
- Marketing & research efforts of key industry leaders in new content, digital media, and traditional film through LA visits and Sundance Film Festival (\$20,000)
- Kem C. Gardner Policy Institute Study – An assessment of the film and digital media industry in Utah (\$50,000)
- Sponsorship with Utah Center for Digital Arts on a Digital Media Summit (\$50,000)
- UFC analyst/additional Part time staff to assist with programs (\$30,000)
- R&D of successful models in other states, travel (\$25,000)
- UFC Industry day and training- (\$25,000)
- Marketing & research efforts of key industry leaders in new content, digital media, and traditional film through LA visits and Sundance Film Festival (\$20,000)

Performance

- Policy Institute Data study will be released in July or August.
- The Utah Film Commission hosted its first Industry Day in partnership with the Salt Lake Community College Center for Arts and Media. Over 200 conference attendees heard from both in and out of state film industry professionals discuss locations, film permits, producing, new content and casting.
- Two successful Intro to Industry trainings resulted in almost 100 new trainees being introduced to job opportunities in the film industry
- Over 450 industry members across the state answered a survey about their role in the film & entertainment industry
- UCDA will hold its summit in October, 2016
- United public, private and education organizations in support of industry: SL County, Provo UofU, UVU, BYU, SLCC, Utah Digital Entertainment Network, Motion Picture Association of Utah, Sundance Institute, Utah Film Center, Salt Lake Film Society, Spy Hop

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Treehouse Museum in Ogden

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$150,000	\$0	\$150,000	\$0	\$150,000	\$150,000	\$0

Explanation

The Legislature appropriated \$150,000 to assist the Treehouse Museum in Ogden. Funding will be used for the Museum's "Get Ready for Kindergarten with Miss Bindergarten" program. The program serves 14,500 children registering for Kindergarten in all eight districts in Northern Utah and about 21,000 parents each year. The funding will allow Treehouse to print and distribute an additional year's worth of materials to Northern Utah schools and offer Kindergarten readiness activities at the Museum for families and schools.

Implementation

Funding was used for printing, collating and paletizing of 14,500 copies of the backpack "Get Ready for Kindergarten with Miss Bindergarten" in Weber, Ogden, Davis, Morgan, North Summit, Box Elder, Cache, Logan, and Rich counties. Direct parent training was provided to 620 adults. All schools that received the readiness materials agreed to use the assessment tool provided by Treehouse in the spring and again in the fall. Resource pages were also created on its website (www.treehousemuseum.org).

Accuracy

Funds were used as intended, for the "Get Ready for Kindergarten with Miss Bindergarten" program, parent training, and resource support.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Clear Horizons (Autism) Academy

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$100,000	\$0	\$100,000	\$0	\$100,000	\$100,000	\$0

Explanation

The Legislature appropriated \$100,000 to the Clear Horizons Academy. Clear Horizons Academy is a nonprofit school dedicated to the education of children with Autism Spectrum Disorders. The request was for funds to put toward the construction of a state of the art facility in Orem which will allow Clear Horizons to further its mission and expand its curriculum.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The pass through agency requested and received 100% of the appropriated funds. The Pass Thru Agency reported that the capital project fund raising continues and funding is being used to improve their parking lot.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Center for Education, Business, and the Arts

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$100,000	\$0	\$100,000	\$0	\$100,000	\$100,000	\$0

Explanation

The Legislature appropriated \$100,000 to the Center for Education, Business and the Arts. CEBA's purpose is to provide the rural area of Kanab City and Kane County with access to educational, business, and entrepreneurial opportunities

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The pass through agency requested and received 100% of the appropriated funds.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Sichuan Province Partnership

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$240,000	\$0	\$240,000	\$0	\$240,000	\$1,500	\$238,500

Explanation

In the 2015 General Session the Legislature provided \$240,000 one-time General Fund for the establishment of a Sichuan Province Partnership and provided the following intent language:

The Legislature intends that \$240,000 of the one-time appropriation in Administration be used for the Sichuan Province Partnership. The Legislature intends:

- (1) this appropriation is nonlapsing;
- (2) GOED ensure that this appropriation is spent to create and organize a legal entity to promote business, education, and investment between Utah and Sichuan, China;
- (3) GOED may delegate the task of creating and organizing the entity to the World Trade Center Utah;
- (4) in creating and organizing the entity, GOED shall consult with the World Trade Center Utah, the co-chairs of the Business and Labor Interim Committee, and the co-chairs of Utah International Relations and Trade Commission;
- (5) GOED may only release monies to the entity after it is legally created; and
- (6) the new entity, with the assistance of GOED and World Trade Center Utah shall:
 - (a) report to the Business and Labor Interim Committee, and the Utah International Relations and Trade Commission by October 31, 2015;
 - (b) provide an accounting of the expenditure of this appropriation; and
 - (c) provide proposed legislation to that committee and commission to formally create, or authorize the creation of, the entity in statute.

Implementation

Articles of incorporation for the Sichuan Province partnership were filed August 2015. However, to date, GOED has only used \$1,500 of the appropriated amount in conjunction with World Trade Center’s contract to support the Sichuan partnership initiative.

GOED is just now beginning to develop the relationship with Sichuan. The relationship with the World Trade Center will help GOED determine how and in which areas these funds can be best deployed for the benefit of the State of Utah. GOED is working with the legislature and the World Trade Center on the upcoming visit of Executive Vice Governor Wang from Sichuan, who will be in Utah on June 26-27, 2016 with a delegation of approximately 90 government and private sector executives to explore collaboration opportunities regarding foreign direct investment, trade development, education, tourism, and national/state parks and forests.

Accuracy

To date \$1,500 of the \$240,000 allocated has been spent to set up a legal entity to manage overall funds. The entity is being administered through the World Trade Center Utah as allowed in the legislative intent. Funding is designated as nonlapsing and will remain available in FY 2017.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Taylorsville Days

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$15,000	\$0	\$15,000	\$0	\$15,000	\$15,000	\$0

Explanation

The Legislature appropriated \$15,000 to produce the Symphony in the Park and the Taylorsville Dayzz Festival.

Implementation

Funds were expended for concert and festival expenses, specifically for staging, power, garbage, sound and canopies.

Accuracy

The funds were spend in accordance with the contract.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Draper Days

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$15,000	\$0	\$15,000	\$0	\$15,000	\$15,000	\$0

Explanation

The Legislature appropriated \$15,000 to produce the Draper Nights Concert and the Draper Days Pioneer Festival.

Implementation

Funds were expended for production of Draper Nights Concerts and Draper Days by paying for stage and entertainment costs.

Accuracy

Funds were used as intended by the Legislature.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 194 - Cultural Business Alliance S.B. 194

Committee: BEDL

Sponsor: Sen. Jim Dabakis

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$75,000	\$0	\$75,000	\$0	\$75,000	\$75,000	\$0

Explanation

The Legislature appropriated \$75,000 for S.B. 194 Cultural Business Alliance. Funding was provided to a six member board that shall: (1) Promote and encourage the development of the arts in the state; (2) Support the efforts of state and local government and nonprofit arts organizations to encourage the development of the arts in the state; (3) recommend policies, priorities, and objectives to the division regarding development of the arts in the state; and (4) approve the use of account funds for arts development.

Implementation

A board was created and funding was provided under contract to local governments and non-profits under a competitive grant process in April of 2016. The following groups received funding:
 Utah State University, \$15,000 for renovation and performance enhancements to the Chase Fine Art Center;
 Helper Arts and Music Festival, \$17,000 for infrastructure for Main Street, updates to the marquee in the Rio Theatre and funds to restore a critically acclaimed WPA art piece;
 Southern Utah University, \$15,000 for construction of the Beverley Taylor Sorenson Center for the Arts;
 Performing Arts Coalition, \$5,000 for website design support and publication efforts;
 Casino Star Theatre Foundation, \$23,000 for the Gunnison Legacy Wall.

Accuracy

Funds were used as intended, to develop the arts.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Desert Star Playhouse

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$100,000	\$0	\$100,000	\$0	\$100,000	\$100,000	\$0

Explanation

The Legislature appropriated \$100,000 to assist with operational support and facility upgrades for the Desert Star Playhouse.

Implementation

Funding was used for operational support/payroll.

Accuracy

Funds were used as intended for utility expenses and operational support.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. H.B. 24 - Insurance Modifications

Committee: BEDL

Sponsor: Rep. James Dunnigan

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$9,000	\$9,000	\$9,000	\$0	\$9,000	\$600	\$8,400

Explanation

H.B. 24 "Insurance Modifications" led to an inclusion in statute of sellers of vehicle protection product warranties. This inclusion led to more license applications for the department to review. In FY 2016 to date, the department has had 32 filings, 12 provider updated applications and one provider application.

Implementation

The department ensured that the entities affected by the bill were made aware of the changes by posting a public notice of rule change and detailing in the notice the adjustment for sellers of vehicle protection product warranties.

Accuracy

The Department had 32 filings, 12 provider updated applications and one provider applications since implementation of the bill resulting in \$550 in total costs. Initial projections anticipated 264 forms would require review for total costs of \$9,000. The division also collected less revenue than originally anticipated because fewer applicants have applied for licenses. To date one applicant has filed the \$300 licensing fee for total revenue collections of \$300.

Performance

The Property and Casualty division's performance measures within SUCCESS are an aggregate that includes timeliness for applications such as those for vehicle protection product warranties. The division has shown marked improvement over the course of the past two years, including this newly added product to regulate.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. H.B. 76 - Insurance Cancellation and Nonrenewal Amendments Committee: BEDL

Sponsor: Rep. Jacob Anderegg

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$18,300	\$18,300	\$18,300	\$0	\$18,300	\$500	\$17,800

Explanation

H.B. 76 Insurance Cancellation and Nonrenewal Amendments, changed the renewal notice requirement in all property and casualty lines of insurance to require notice that the relevant policy will lapse 10 days after the notice. Pursuant to UCA 31A-21-201, such a notice is a "form" that must be filed with the Department. However, the final iteration of the bill was changed at the last minute and the amendments essentially maintained what already existed in the law. The fiscal note reflected the initial changes, but not some of the final changes. Thus, the funding that was provided was only needed on a very limited basis if any companies opted to make the changes suggested in the initial form of the bill. As it is one-time funding, the remaining amount will be returned to the General Fund.

Implementation

No net statutory changes. However, a company can make the changes on their own. If so, they would submit a form to the department reflecting this change. The department saw very little of this during the fiscal year.

Accuracy

The entire amount of funding was not required to implement this particular bill. However, that funding will be returned to the General Fund by the department.

Performance

No performance measures have been created or tracked

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. H.B. 121 - Interstate Medical Licensure Compact

Committee: BEDL

Sponsor: Rep. Raymond Ward

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$92,500	\$74,000	\$92,500	\$0	\$92,500	\$73,000	\$19,500

Explanation

H.B. 121 "Interstate Medical Licensure Compact" passed in the 2015 General Session. The adoption of the Interstate Medical Compact allows the Division of Occupational and Professional Licensing to work with other states in providing additional opportunities to practice medicine between states. As adopted it did not supplant any of the existing state board or statutory regulations already in place for licensing and enforcement. It not only provided additional guidance on jurisdiction issues between patients and providers who practice in different (often neighboring) states, it provides a more universal interpretation of standard of care processes and procedures that will allow physicians to practice in multiple states and still be subject to regulations in each state they practice in a manner that is in the best interest of the patient and attending physician. DOPL is reliant upon the national organization of which Utah is a member to establish uniform criteria regarding the interstate medical licensure compact. DOPL received \$74,100 in ongoing funds and \$18,400 in one-time funding for implementation.

Implementation

DOPL hired an FTE to help implement this program with the \$74,100 ongoing funds. The hiring of a licensing individual was purposely postponed until later in FY 2016 as it was not yet requisite to have an individual as licenses could not yet be issued. First year fund expenditures have been related to implementation of the program groundwork for this new program. The process has necessitated constant industry information updates and interface with the applicable boards to ensure judicious and consistent implementation between states. It is anticipated that this program will continue to expand in coming years and continue to justify the need for the staff hired for this program.

The actual hard launch of the licensing portion of the program has thus far been delayed. The enforcement arm of this legislation has and will continue to be a consideration in investigations.

Accuracy

Implementation expenses were realized at a slower rate than expected, In part by DOPL's choice to delay hiring a licensing specialist absent an official way for new licensees to register. Revenue associated with Physicians applying to be registered as Interstate Physicians through a central licensing process has not yet been fully authorized by the Interstate Licensure Compact that includes representatives from all states. DOPL estimates incremental revenue collections of additional physicians obtaining licenses in anticipation of the formal interstate repository to be approximately \$60,000, DOPL's assessment is that projected revenue associated directly with licensure has been delayed due to circumstances at the multi-state level delaying the still projected outcome and official launch of the availability of this license opportunity. Essentially, startup costs and implementation have been much higher than anticipated, and licensing costs have only been partially realized.

Actual expenses experienced in year one of this program were as follows: 1/3 investigator obtaining training and making contact with out of state physicians that are perspective compact licensees \$31,000, 1/4 manager time developing policy, attending compact board meetings, and travel \$42,000. With the remaining \$19,500 lapsing to the General Fund.

Performance

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. H.B. 121 - Interstate Medical Licensure Compact

Committee: BEDL

Sponsor: Rep. Raymond Ward

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$92,500	\$74,000	\$92,500	\$0	\$92,500	\$73,000	\$19,500

Performance data specific to the scope of this change is not applicable, the actual volume experienced in interstate applications will rise over time, but has not yet come to fruition directly as a new licensing group. These new applicants for licensure based on out of state practice are being processed in an expeditious manner in concert with DOPL's success standard to process 70 percent of licenses within seven days, this standard will apply to all compact registrants as well.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. H.B. 209 - Suicide Prevention Program Amendments

Committee: BEDL

Sponsor: Rep. Justin Fawson

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$2,800	\$0	\$2,800	\$0	\$2,800	\$2,800	\$0

Explanation

H.B. 209 Suicide Prevention Program Amendments required individual licensees to pay the cost of the two hours of suicide prevention training every two years. Licensee categories included: Clinical Mental Health Counselors, Marriage and Family Therapists, Social Workers, Mental Health Counselors, and Substance Abuse Counselors. DOPL received \$2,800 in one-time funds.

Implementation

Funds were used for manager time to develop rules and implement the requirements for the suicide prevention education to the prescribed groups. Manager time was also spent with the perspective boards to develop rules, certify acceptable training programs and implement the CE requirement were performed to at least the 50 hours in sum equating to the \$2,800 appropriation.

Accuracy

Implementation expenses were consistent with projections.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. H.B. 395 - Controlled Substance Database Amendments

Committee: BEDL

Sponsor: Rep. Edward Redd

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$46,000	\$0	\$46,000	\$0	\$46,000	\$46,000	\$0

Explanation

Funding was provided to allow some pharmacies the ability to report filled prescriptions at their individual discretion in real time.

Implementation

The appropriation was used to pay a maintenance fee to the third party provider. Funding was contracted to provide real time reporting at designated pharmacy locations in the state to the Controlled Substance Database. This program is billed to the agency annually.

Accuracy

Implementation expenses were consistent with projections.

Performance

Performance data is used to compare real time reporting with non real time reporting pharmacies for actual or perceived benefits in patient safety, and enforcement of regulators.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 51 - Motor Vehicle Enforcement Division Account Amendments

Sponsor: Sen. Wayne Harper

Committee: BEDL

Analyst: Clare Lence

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$0	\$0	\$0	\$0	\$0	\$0	\$0

Explanation

S.B. 51, "Motor Vehicle Enforcement Division Account Amendments," 2015 General Session, created a new fund called the Motor Vehicle Enforcement Division Temporary Permit Restricted Account. Following the legislation, fees collected by the division, which is organized within the Tax Commission, are deposited into the new account rather than as dedicated credits in the General Fund. The intent of the legislation was to provide more reliable support for the division given some volatility in collections across years, through the new account and by providing statutory nonlapsing authority for appropriations from the account.

Implementation

As of July 1, 2015, the Division of Finance has directed applicable fees to the Motor Vehicle Enforcement Division Temporary Permit Restricted Account and disburses funds from the account consistent with legislative appropriations and policies governing restricted accounts.

Accuracy

An appropriation included in S.B. 51 decreased funding for the division by \$3,764,500 from dedicated credits and increased it by \$3,764,500 from the restricted account. The net impact of the funding change is \$0.

Performance

The agency did not provide any performance measures.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 64 - Utah Educational Savings Plan Amendments

Committee: BEDL

Sponsor: Sen. Todd Weiler

Analyst: Clare Lence

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$10,200	\$0	\$10,200	\$0	\$10,200	\$0	\$10,200

Explanation

S.B. 64, "Utah Educational Savings Plan Amendments," 2015 General Session, modified tax deduction, contribution, and credit provisions related to Utah Educational Savings Plan (UESP) accounts. It specifically allows taxpayers to use a portion of their income tax refund as a contribution to a UESP account. To implement the programming changes required by this provision, the Legislature appropriated \$10,200 in dedicated credits to the Tax Commission, to be paid by UESP.

Implementation

The bill carried an effective date of January 1, 2016. Tax returns for 2016 are not processed until 2017. As such, the Tax Commission will commence necessary system programming in FY 2017 and dedicated credit funding will be received at that time.

Accuracy

No funding has been spent, given the effective date.

Performance

The agency did not provide any performance measures.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 92 - Dental Practice Act Amendments

Committee: BEDL

Sponsor: Sen. Peter Knudson

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
(\$2,000)	\$0	(\$2,000)	\$0	(\$2,000)	(\$2,000)	\$0

Explanation

S.B. 92 Dental Practice Act Amendments exempted from licensure individuals appointed to a faculty position at an accredited dental school if the individual is performing position functions under the direction of a licensed Dentist.

Implementation

The exemption of this small sub-set of dentists that were previously licensed saves DOPL approximately \$2,000 in expenses no longer incurred to process registrations.

Accuracy

Implementation expense savings were consistent with projections.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 93 - Uniform Commercial Code Filing Amendments

Committee: BEDL

Sponsor: Sen. Lyle Hillyard

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$3,000	\$0	\$3,000	\$0	\$3,000	\$3,000	\$0

Explanation

S.B. 93 Uniform Commercial Code Filing Amendments was passed to protect individuals against Uniform Commercial Code filings performed fraudulently in their name. The Division of Corporations received a one-time appropriation of \$3,000 for implementation.

Implementation

Commerce performed up front rule-making, form development, system modification in the amount of \$1,200 and help from DTS in mining the data into a repository to find Un-authorized or improperly filed UCC's for referral in the amount of \$1,800

Accuracy

Implementation expenses were consistent with projections.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 108 - Social Work Amendments

Committee: BEDL

Sponsor: Sen. Gene Davis

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$2,100	\$8,600	\$2,100	\$0	\$2,100	\$2,100	\$0

Explanation

S.B. 108 Social Work Amendments gave individuals more latitude to represent themselves as social workers, but also subjected them to investigation from DOPL. DOPL received \$800 ongoing for staff time and \$1,300 one-time funding to implement this program.

Implementation

DOPL anticipates an average of an additional 58 complaints annually that will require an investigation. This was estimated based on complaints at a rate of 3% of the estimated unlicensed social workers that will now be subject to investigation. Investigators were trained to determine individuals' qualifications to be exempt from licensure or not and will continue to investigate such complaints.

Accuracy

Implementation expenses were consistent with projections.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 119 - Prescription Database Revisions

Committee: BEDL

Sponsor: Sen. Todd Weiler

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$33,900	\$17,200	\$33,900	\$0	\$33,900	\$33,900	\$0

Explanation

S.B. 119 Prescription Database Revisions required additional staff time to help execute law enforcement warrants that include requests for reporting of information contained in the database. DOPL received \$17,200 ongoing for staff time and \$16,700 one-time funding to implement this program. Updated to the database were requisite to allow the for the required reporting functionality.

Implementation

One-time funding was utilized almost immediately for programming costs to update the database with the capability to track who in law enforcement has accessed records. Ongoing funding to provide reports of access, triage requests, search and mail records, and answer phone calls for three additional hours per week, were realized.

Accuracy

Implementation expenses were consistent with projections.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 131 - Occupational Therapists Amendments

Committee: BEDL

Sponsor: Sen. Gene Davis

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$2,100	\$8,010	\$2,100	\$0	\$2,100	\$2,100	\$0

Explanation

S.B. 131 Occupational Therapists Amendments requires occupational therapists to obtain additional continuing education to be eligible for licensure application and renewal. Specifically 24 hours of fieldwork and 24 hours of continuing education every two years will now be required for license renewal.

Implementation

Additional continuing education requirements are to be completed by the licensee and verified as well as audited by DOPL. New applications will need to be verified to have completed the 24 hours of supervised field work experience. Random audits of these applications minimize the overall cost of implementation consistent with the appropriation. DOPL implemented the process in a timely manner.

Accuracy

Implementation expenses were consistent with projections.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 133 - Podiatric Physician Amendments

Committee: BEDL

Sponsor: *Sen. David Hinkins*

Analyst: *Andrea Wilko*

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$2,300	\$2,300	\$2,300	\$0	\$2,300	\$2,300	\$0

Explanation

S.B. 133 Podiatric Physician Amendments expanded the scope of practice of podiatric physicians and consequently subjected them to increased risk of patient or peer complaints. DOPL investigates such complaints, however minimal.

Implementation

DOPL utilized these funds in year one to spend time with investigators ensuring they understand and can enforce the expanded scope of practice for Podiatric Physicians. Future years will be spent physically investigating incremental complaints.

Accuracy

Implementation expenses were consistent with projections.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 179 - Amendments to Economic Development

Committee: BEDL

Sponsor: Sen. Brian Shiozawa

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$100,000	\$0	\$100,000	\$0	\$100,000	\$100,000	\$0

Explanation

S.B. 179 Amendments to Economic Development appropriated \$100,000 to strengthen the compliance division.

Implementation

Funds were expended in FY 2016 on 2 FTE. A Compliance Auditor and an Internal Auditor.

Accuracy

Funds were used as intended by the legislature. Additional FTE were hired resulting in increased reporting and tracking of programs

Performance

Funds were used to complete an internal risk assessment and one internal audit by the new Internal Auditor. Policies and procedures are being established for compliance with additional reporting and tracking of programmatic results.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 198 - Alcoholic Beverage Control Amendments

Committee: BEDL

Sponsor: Sen. Jerry Stevenson

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$15,600	\$0	\$15,600	\$0	\$15,600	\$26,200	(\$10,600)

Explanation

S.B. 198 "Alcoholic Beverage Control Amendments" modified the statutory language related to fingerprinting and background checks. The bill addressed the role of the Utah Bureau of Criminal Investigation in the background check process, required federal background checks for certain individuals and changed the background check procedure.

Implementation

The department updated its policies and procedures to comply with the statute before the May 2015 effective date. Employees with benefits are now required to consent to a background check by the Bureau of Criminal Identification and the Federal Bureau of Investigation when the Department of Alcoholic Beverage Control offers the individual employment. The department pays for the cost of background checks including the costs to obtain fingerprints.

Accuracy

The department originally assumed approximately 312 individuals would require background checks for total costs of \$15,600. The department has experienced \$26,200 in actual costs to date, a cost underestimate of \$10,600.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 246 - Licensing of Autism Providers

Committee: BEDL

Sponsor: Sen. Brian Shiozawa

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$25,500	\$16,500	\$25,500	\$0	\$25,500	\$25,500	\$0

Explanation

S.B. 246 "Licensing of Autism Providers" required the licensing of Behavioral Analysts, Assistance Behavioral Analysts, Behavioral Specialists and Assistant Behavioral Specialists that specialize as autism providers. All the referenced categories were sub-sets of previously unlicensed individuals. The provisions of the bill required the Division of Occupational and Professional Licensing (DOPL) to develop criteria for application, enforcement, testing, and industry interfacing. DOPL received \$16,500 ongoing and \$9,000 one-time to implement the program.

Implementation

Licensing of an estimated 270 new Behavioral Analysts and Behavioral specialists annually takes additional licensing and enforcement time. Two additional board members to represent these professions were retained to assist in these efforts before July 1, 2015. Year one implementation of this program required also extensive staff time and board interface time to develop rules, establish programs, develop applications and scope of practice for these professions.

Accuracy

Implementation expenses were consistent with projections so far. Revenue in year one was \$17,900, this amount represents approximately 60 percent of the projected total licensees over the first two years that will renew again in two years at a rate of \$93 and \$85 respectively, thus the total amount of anticipated licensees remains accurate as far as DOPL can tell at this juncture.

DOPL has spent time in the following functions in personnel expenses: Training investigative staff that will respond to complaints about these professions 200 hours at \$37.5 = \$7,500, two additional board meetings = \$2,200, approximately 180 hours of management time to write rules and establish the program = \$9,500. The remaining funds were spent on 320 hours of licensing time at just under two hours per application or \$6,300.

Performance

Performance data specific to the scope of this change is not applicable. While the number of behavioral professionals to date registered with DOPL sits at 160, as one of it's SUCCESS initiatives DOPL was able to process these 160 new applications within the acceptable time-frame of 70 percent completed within seven days. Applications that are incomplete take additional follow up with the applicant and often additional time to complete.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 250 - Income Tax Revisions

Committee: BEDL

Sponsor: Sen. Curtis Bramble

Analyst: Clare Lence

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$129,000	\$0	\$129,000	\$0	\$129,000	\$148,100	(\$19,100)

Explanation

S.B. 250, "Income Tax Revisions," 2015 General Session, modified requirements for employers and procedures for the Tax Commission related to income tax filings. The legislation required employers to file W-2 forms and reconciliation information with the State electronically, with earlier due dates and penalties for non-compliance. The changes were intended to improve identification of fraudulent income tax returns by facilitating data-matching prior to processing returns, by comparing employer W-2 information with taxpayer-filed information. The Legislature intended that the appropriation fund correspondence with all employers in the State regarding the changes and with individual taxpayers for whom insufficient or non-matching information was identified. The funding was also intended to support seasonal staff to assist in the review and verification process. S.B. 250 took effect January 1, 2016. The appropriation to the Tax Commission consisted of \$83,000 ongoing and \$46,000 one-time, both from the Education Fund, since income tax collections are deposited into the Education Fund.

Implementation

The Tax Commission implemented procedural changes in January 2016, for the 2015 withholding and income tax filing period. The commission sent two bulletins, in July and December 2015, to each of 75,000 employers in the State to provide notification of the changes in filing requirements and the associated non-compliance penalties. As returns were filed and processed, the commission sent letters to individual taxpayers whose returns were flagged by the data-match process to assess the accuracy of their return information. Seasonal staff were hired in February 2016.

Accuracy

The Tax Commission estimated final FY 2016 costs at \$148,100 -- \$19,100 or about 15 percent higher than the appropriated amount. The commission sent two bulletins to employers instead of one, as originally anticipated, which led to additional mailing costs of \$37,500, or \$75,000 total. The costs for seasonal staff were less than estimated, at \$22,300, because some current staff was leveraged. More taxpayer returns were flagged by the data-matching process and required follow-up than was initially estimated.

Performance

As performance metrics for S.B. 250 initiatives, the Tax Commission tracks the number of identified mismatched returns and the percentage of individuals who respond after receiving a verification letter. The commission also tracks the total dollar amount of avoided losses through their various fraud detection systems. The commission reported that these measures will be available at the end of the filing period, which closes at the end of calendar year 2016.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. S.B. 294 - Transportation Network Company Amendments

Committee: BEDL

Sponsor: Sen. J. Adams

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$20,000	\$20,000	\$20,000	\$0	\$20,000	\$20,000	\$0

Explanation

S.B. 294 Transportation Network Companies Amendments required Transportation Network Companies to register with the Division of Consumer Protection and provide certain financial, bond, and operating information to become approved as licensed firms to operate in Utah.

Implementation

Each Transportation Network Company is subject to registration (which includes adequate insurance coverage requirements), regularly scheduled records audits, and investigative audits based on complaints.

Processing and Audits:

Auditor and Assistant Auditor office specialist spent 80 hours doing on location regular audits. The number of registrants currently sits at two, but year one expenses did in fact reach the estimated levels due to managerial implementation time spent.

Accuracy

Implementation expenses were consistent with projections. Revenue however was only \$10,000 as not all anticipated firms have registered to practice in Utah. It is expected that more firms will register and start doing business in Utah in the future.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Cedar City Business Resource Center

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$25,000	\$0	\$25,000	\$0	\$25,000	\$25,000	\$0

Explanation

The Legislature appropriated \$25,000 for the Cedar City Business Resource Center at Southern Utah University.

Implementation

For FY2016 the Southern Utah University Business Resource Center (SUUBRC) received \$25,000 in one-time funding. This funding was provided to SUUBRC through GOED to provide services to small business from their location in Cedar City in the form of one-stop technical assistance and access to business resource services from a variety of federal, state, local and private programs.

Accuracy

This funding was directed by the Utah State Legislature for the operations and programs of the SUUBRC and was passed through GOED. The SUUBRC provides services to the Iron, Beaver and Garfield Counties region.

The SUUBRC provides an array of business services – including training, counseling, and one-on-one mentoring – delivered by a variety of service providers. The SUUBRC draws upon the faculty, student and technology resources of Southern Utah University, as well as public and private sector entities and expertise, to address the challenges of regional entrepreneurs and business growth and development. In addition to counseling and training services the SUUBRC’s programs also include the Business Expansion and Retention (BEAR) Initiative, economic gardening (assisting business with strategic market data), supporting TechUp Southern Utah (an emerging high-tech business sector network), and a business incubator facility. During this fiscal year the SUUBRC moved to a new facility that will make operations more sustainable by lowering rent and increasing incubator space available. Funding received from the Utah State Legislature was used to cover operating costs for the center, principally rent, office supplies, etc.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Davis County Achievement Center

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$15,000	\$0	\$15,000	\$0	\$15,000	\$15,000	\$0

Explanation

The Legislature appropriated \$15,000 to GiGi's Playhouse one-time to help support GiGi's Playhouse in Layton, an achievement center for individuals with Down Syndrome, their families, and the community. Funding will be used to help support therapeutic and educational programs that advance literacy, math skills, and motor skills.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The Pass Thru Agency requested and received 100% of the appropriated funds. The Pass Thru Agency reported that the funds were used to purchase books, software and supplies.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. NICA Utah League

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$20,000	\$0	\$20,000	\$0	\$20,000	\$20,000	\$0

Explanation

The Legislature appropriated \$20,000 one-time to the Utah National Interscholastic Cycling Association to support the various events of the Utah High School Cycling League.

Implementation

Following the GOED Grants Process, pass thru agencies signed the GOED grant agreement and provided the necessary additional information to receive the initial allocation of 75% of the total appropriation. Upon completion of the event, the pass thru agency submits a final report and invoice for the remaining 25%.

Accuracy

The Pass Thru Agency requested and received 100% of the appropriated funds. The recipient reported the funds were used to provide emergency medical services at its events with participation exceeding 1,600 student athletes. Funds were also used for software.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2015 G.S. Odyssey Dance Theater

Committee: BEDL

Analyst: Andrea Wilko

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$75,000	\$0	\$75,000	\$0	\$75,000	\$75,000	\$0

Explanation

The Legislature appropriated \$75,000 to help with outreach efforts for the Odyssey Dance Theater. This grant will allow a new school-aged outreach program for ODT's Thriller Production (9/26/15 to 11/1/15) in which 1000 performance tickets will be given to disadvantaged Utah school children across the state. Funding will also be used for two special group performances for ages K-12 of ODT's production of ReduxNut-Cracker at Kingsbury Hall for schools in Davis, Salt Lake, and Granite School Districts, as well as a World Premier Debut which will be performed by Odyssey's Company dancers at it's annual Shut up and Dance production at Kingsbury Hall (3/9/16 to 3/19/16).

Implementation

Funding was used to the Odyssey Dance Theater's outreach program for its Thriller Production, ReduxNut-Cracker Production, and its new premier production of "Prodigals" in its Shut up and Dance season.

Accuracy

Funds were used as intended, for the three productions of Thriller, ReduxNut-Cracker, and "Prodigals" as part of its Shut up and Dance Season.

Performance

No performance measures have been created or tracked.

FISCAL NOTE AND BUDGET ITEM FOLLOW-UP REPORT

2016 G.S. Lassonde Center for Innovation - Community Banking Program

Committee: BEDL

Analyst: Clare Lence

Cost Estimate	Revenue Estimate	Original Approp.	Changes	Subtotal	Experienced	Difference
\$300,000	\$0	\$300,000	\$0	\$300,000	\$202,500	\$97,500

Explanation

During the 2016 General Session, the Legislature appropriated \$300,000 for FY 2016 and \$300,000 for FY 2017 from the Department of Financial Institutions Restricted Account for the purpose of supporting research on regulatory issues associated with new financial products and technologies and the deployment of new financial products and services beneficial to state-chartered financial institutions. The Department of Financial Institutions passed through the funding for FY 2016 to the Center for Innovation in Banking and Financial Services at the Lassonde Entrepreneur Institute at the University of Utah, which was intended to support student scholarships, research grants, a research coordinator, database development, and publications. The center will report performance measures to the department in order to receive future funding, which could include \$300,000 for FY 2017 and potentially an additional \$300,000 for FY 2018, pending legislative appropriation.

Implementation

On December 23, 2015, the department disbursed \$300,000 to the University of Utah, with a designation that funding was for the Center for Innovation in Banking and Financial Services. The supplemental appropriation for FY 2016 reimbursed the department for this expense.

Accuracy

The department disbursed the full \$300,000 for FY 2016 to the University of Utah. As of June 2016, the center had pledged \$202,500 in expenditure commitments. The center is scheduled to report on budget progress at the Board of Financial Institutions meeting on September 21, 2016.

Performance

The center has not yet provided any performance measures. The center is scheduled to report on performance at the Board of Financial Institutions meeting on September 21, 2016. The board must review and approve the center's performance measures before any subsequent funding is disbursed.

Appendix A - Guidelines for Scoring Follow-ups

Fiscal Note Building Block Follow-Up Report

The Analyst follows up on bills and building blocks from two sessions ago.

- **Item Explanation**
What the appropriation is supposed to do. For bills the explanation is the fiscal note
- **Implementation**
Is the item being implemented in a timely manner?
- **Accuracy**
Was the fiscal note accurate? Both the Analyst and the agency are rated.
- **Performance Measures**
Shown and evaluated when appropriate.
- **Follow the Money**
The report traces funding from the original request to the remaining balance.

Red - Yellow - Green Guidelines

We point out problems, potential trouble, and things going as expected with traffic light colors.

One Size Does Not Fit All

Early on, we found that what was reasonable for revenue estimates is unreasonable for ordinary bills and building blocks. Our guidelines are less stringent when an agency is asked to do something new and different than their usual fare.

\$10,000 Rule

The temptation to manage a fiscal note is so great that we give an automatic Yellow to any bill with a fiscal note near \$10,000.

The Director's Exception

The Director may draw your attention to any bill or building block with a yellow if the item needs your attention.

Current Rules

Accuracy of Familiar Programs / Processes

-  Green - Within 5% of estimate or variances less than \$10,000.
-  Yellow - Greater than 5% but less than or equal to 10% of estimate and more than \$10,000.
-  Red - Greater than 10% of estimate and more than \$10,000.

Accuracy of Unfamiliar Programs / Processes

-  Green - Within 10% of estimate or variances less than \$10,000.
-  Yellow - Greater than 10% but less than or equal to 20% of estimate and more than \$10,000.
-  Red - Greater than 20% of estimate and more than \$10,000.

Accuracy of Revenue Bills

-  Green - Within the estimates margin of error.
-  Yellow - Greater than margin of error but less than two times margin of error.
-  Red - Greater than two times margin of error.

Implementation

-  Green - Implemented within the first month of the bill's effective date. The definition of implemented will vary according to the difficulty of the bill's task. Tasks that are too large to be implemented in the first month can be considered implemented if the agency has a reasonable plan and they are on schedule.
-  Yellow - Implemented after the first month but before the fourth month of the bill's effective date.
-  Red - Implemented after three months of the bill's effective date.

Performance Measures

The Analyst will decide if performance measures are appropriate and will use the "Implementation" guidelines. The Analyst will evaluate the agency's performance measures and recommend alternate measures when necessary.